



xTrain Re-Appointment & Amendment

Quick Reference Guide for Institution Users

1. The PD/PI Accesses the Trainee Roster in xTrain

- The PD/PI logs into eRA Commons and selects the **xTrain** tab to open the *My Grants* screen.
- From the list of grants presented, the PD/PI selects the **View Trainee Roster** link for the desired grant.
- The *Trainee Roster* appears, with the default of the **Latest and Previous Awarded Support Years**.

NOTE: A designated Assistant may perform PD/PI tasks in xTrain, except for submitting forms to the Agency.

2. The PD/PI Initiates a Re-Appointment

- The PD/PI selects Re-Appoint 2271 link from the *Trainee Roster* for a desired support year:
 - Re-Appoint 2271 or Amend 2271 link appears under the **Action** column for the chosen Trainee. The link for reappointment is on the last appointment year for the trainee.
 - A 2271 form is opened with fields pre-populated from the Trainee's Personal Profile. The PD/PI enters the Appointment information and presses the **Save** button. The PI selects the grant year they wish to re-appoint the trainee to, the appointment period, and the stipend amount. The **Appointment Status** is set to *In Progress PI*.

3. The PD/PI Initiates an Amendment

- The PD/PI selects Amend 2271 link from the *Trainee Roster* for a desired support year.
- A 2271 form is opened with fields pre-populated from the Trainee's Personal Profile.
- The PD/PI modifies the Appointment Period or Stipend level and presses the **Save**

button. The PI should enter the stipend amount. The **Appointment Status** is set to *In Progress PI*.

4. The PD/PI Routes the 2271 to the Trainee

The PD/PI clicks the **Save & Route to Trainee** button at the bottom of the form.

- xTrain checks the form and may alert the PD/PI to errors to be addressed or warnings to consider. If the form is error-free it will be routed to the Trainee, but if not, the errors must be corrected before proceeding.
- Once successfully routed, the status in the Trainee Roster becomes *In Progress Trainee*.
- An email is sent to the Trainee about the routing action.

5. The Trainee Goes to xTrain and Completes the Form

- After being alerted by email about the pending Re-appointment or amendment, the Trainee logs into eRA Commons and selects the **xTrain** tab to open the *Trainee Appointments and Terminations* screen.
- To access the reappointment or amendment form, the Trainee selects the **Process 2271** link, and then completes the appropriate form fields.
- After completing the form, the Trainee clicks the **Save & Route to PI** button to send it back to the PD/PI.
- xTrain checks the form and may alert the Trainee about errors to be addressed or warnings to consider. If the form is error-free it will be routed to the PD/PI, but if not, the errors must be corrected before proceeding.
- Upon routing, the Trainee's Electronic Signature is recorded and the status in the Trainee Roster becomes *In Progress PI*.
- An email is sent to the PD/PI and the Assistant about the Trainee's routing action.

6. The PD/PI Submits the 2271 to the Agency

- When submitting re-appointments or amendment to the Agency, PD/PIs can submit re-appointments one by one or many at a time through the batch process.
 - Single Submission: From the *Trainee Roster* screen, the PD/PI opens the form by selecting the **Process 2271** link. The PD/PI reviews the form and clicks **Save** to retain any updates. When satisfied with the form, the PD/PI sends the form to the Agency by clicking the **Save & Submit to Agency** button.
 - Batch Submission: The PD/PI clicks the **View Pending Submissions** link on the *My Grants* screen and selects Appointments to submit.
- xTrain checks the form(s) and may alert the PD/PI about errors to correct or warnings to consider. If the form is error-free it will be routed to the Agency, but if not, the PD/PI must correct the errors before submitting the 2271. For the batch process, the PD/PI can de-select the Appointments with errors and correct them later. The PD/PI's Electronic Signature is recorded, and the status becomes *Pending Agency Review*.

- If applicable, the PD/PI also mails proof of permanent residency and/or a signed, hard copy of the Payback Service Agreement (for first-time postdoctoral Trainees appointed to Kirschstein-NRSA training grants only).
- An email is sent to PD/PI and the Trainee. For multi-PIs grants the email should go to the Contact PI and the PI who initiated the 2271.

7. The Agency Processes the Re-Appointment, or Amendment

- The Agency can accept the 2271, place it on hold until any required documentation arrives, or return it with comments.
 - An email is sent to PD/PI and the Trainee. For multi-PIs grants the email should go to the Contact PI and the PI who initiated the 2271.
-